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EUROPEAN USED CAR MARKET BAROMETER

March 2025

LEARNINGS

Global observation

Compared to last year, we note an increase in demand for used vehicles in almost all of the top 12 European countries (9 out of 12).

The situation is more mixed regarding supply, although the majority of countries (7 out of 12) have lower stock levels in 2025 than in 2024.

Therefore, at the European level, we can consider a relative improvement in market conditions at the beginning of 2025.

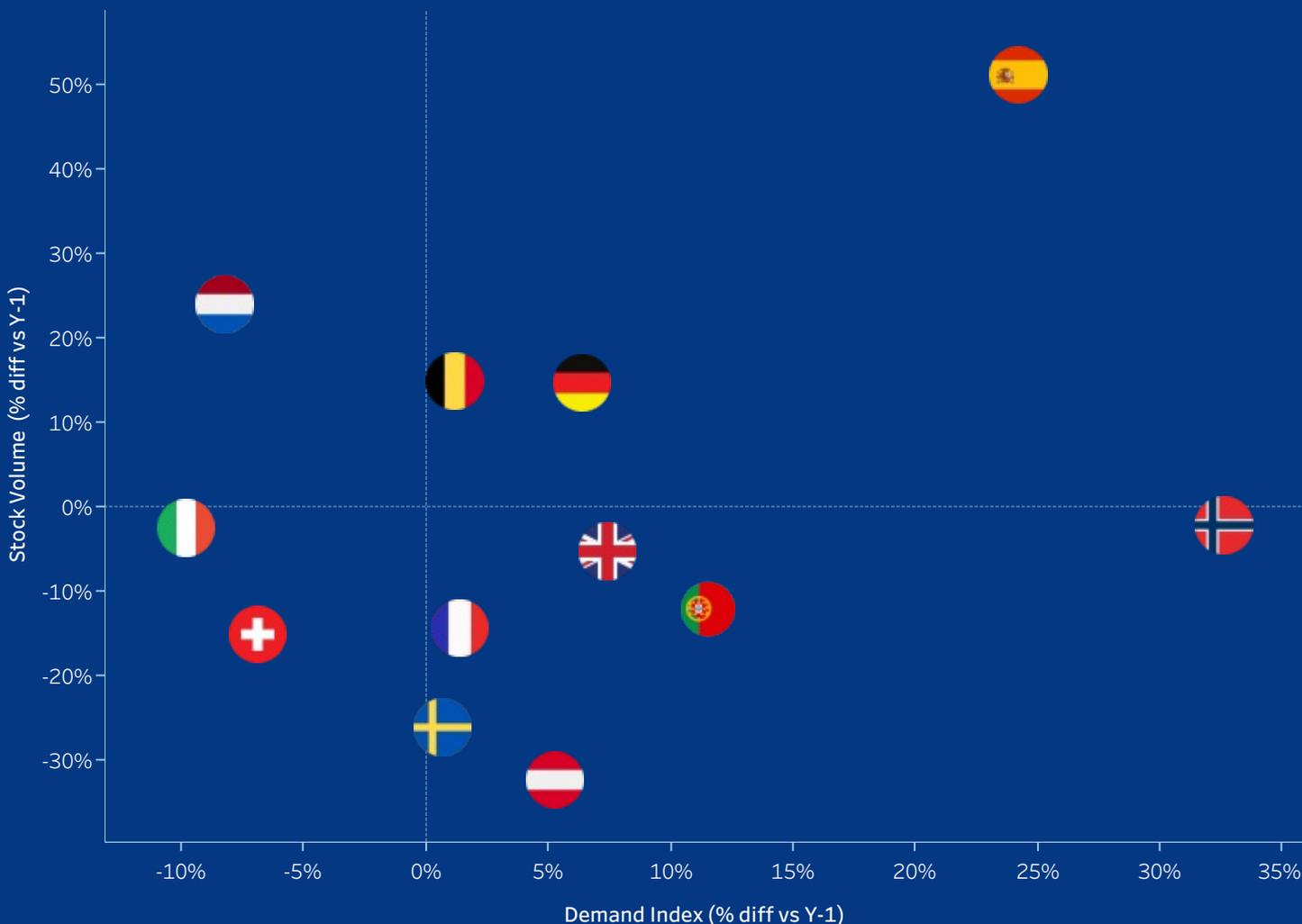
Country level observation

Firstly, four of the largest markets on the continent, Germany, the United Kingdom, Spain, and Belgium, are in a "healthy" market growth position with a proportional increase in stocks and consumer demand.

With decreasing stocks and increasing demand, Sweden, Austria, Portugal, Norway, and France seem to be in very favorable market situations for sellers, but with potential price issues related to unbalanced supply and demand.

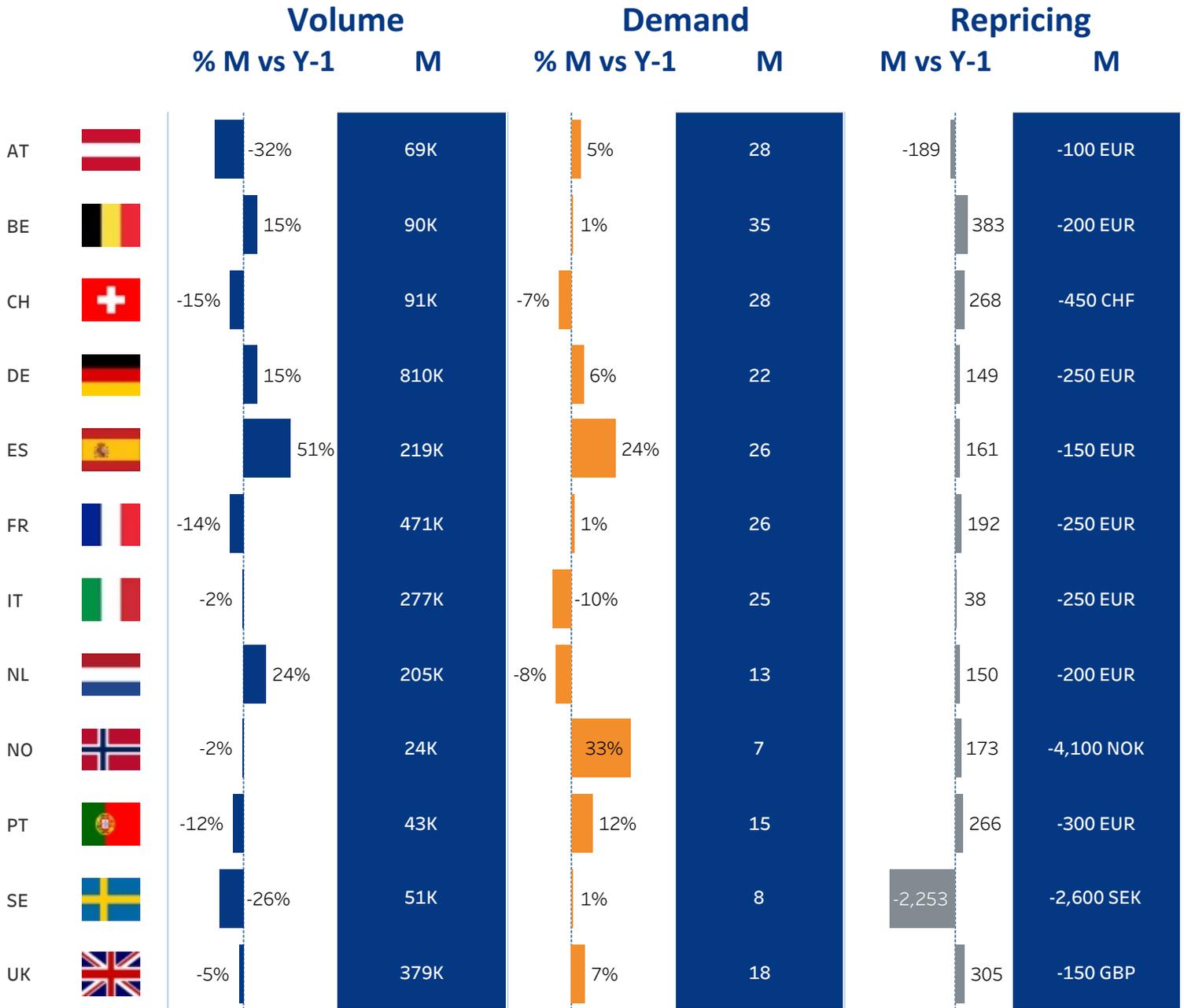
Italy and Switzerland should be closely monitored as their volume and demand are decreasing proportionally, which could ultimately reduce used vehicle sales in the market.

Finally, the situation in the Netherlands seems very different with a decrease in demand linked to an increase in stocks. Potentially complicated situations to follow in the coming months.



EUROPE OVERVIEW

Top 12 markets



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KPIs definition

Stock Volume



Volume of deduplicated ads observed online with age **≤96 months** and mileage **≤200,000 km** within professional dealer stock.

Demand Index



Average Google trends on fuel type key words (100 being the maximum of research made in one day since 8 years on one of the energy key words).

Repricing Index



Delta between all new or updated ad price and autobiz market valuation on a weekly basis. autobiz's valuation being based on the previous week market observation, this KPIs indicated the pricing trends of the new pricing each week - local currency is displayed.

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